

APPENDIX A

EVALUATION

GUIDELINES

FOR

REQUESTS

FOR

PROPOSALS

1 OVERVIEW OF REQUEST FOR PROPOSALS

The use of an Invitation for Bid is used for the purchase of commodities and equipment and does not permit negotiations. Unlike this traditional method of procurement, Requests for Proposals utilize the Best value technique and consider cost as just one of several criteria necessary to make a decision. We select the most advantageous offer by evaluating and comparing factors in addition to cost or price. The process is usually, but not exclusively, used for the purchase of services and information technology. Best value is a more expensive and time consuming process and must be weighed against the expected returns.

Considering the time, money, and resource expenditures demanded by the process, best value should be reserved for situations where we desire to secure a supply or service without being limited to the low bid option. The Procurement Department offers the following tips on when to consider best value:

- / When we have defined a need and would like offerors to propose the best method for accomplishing it.
- / When we want to consider factors other than lowest price when determining whether or not to make an award.
- / When the skills, expertise, or technical capability of the bidders will be evaluated.
- / When the problem or need is fairly detailed or complex.
- / When the problem or need involves services or a combination of supplies and services.
- / When we may need the opportunity to ask offerors to revise their proposals through clarification questions or a Best and final offer process.
- / When specifications of the project cannot be clearly defined.

In order to make the RFP process productive to both the County and interested firms, we must first determine what the final outcome is meant to fulfill and what we expect of the winning contractor in terms of skills, past performance, and different abilities. In other words, we must identify factors relevant to the selection of a contractor, then prioritize or weigh those factors according to their importance. The focus thus shifts from price to goals and requirements.

After determining expectations, we must establish evaluation criteria. Commonly used criteria include qualifications, relevant experience, quality of work, references, service, physical facilities, human resources, cost, technical capabilities, and proposed time lines. We assign a priority or weight to each factor according to its importance. In general, Procurement suggests criteria have the following characteristics:

- / Objective: Criteria should not be subject to diverging interpretation.
- / All-encompassing: Criteria should address all key elements of the contract.
- / Clear: Criteria should separate best, average, and weaker proposals.
- / Non-discriminatory: Criteria should be fair and reasonable.

- / Realistic: Criteria should be within reason, given the contract nature and/or value.
- / Measurable: Criteria should have measurable standards.
- / Economical: Criteria should not consume an unreasonable amount of time or resources.

2 INTENT OF THESE GUIDELINES

These guidelines are to be used as an aid in the evaluation process. They may be adjusted by the Procurement Manager depending on their application to specific solicitations.

The Selection Committee must review the guidelines carefully to be certain that they are operating within their constraints. If changes to the guidelines are desired, the Selection Committee shall contact the Procurement Manager who may (providing the changes desired do not conflict with existing regulations, resolutions, policies or procedures) adapt the guidelines to the specific needs of the solicitation. No changes to the guidelines may be made without the advance approval of the Procurement Manager.

3 THE SELECTION COMMITTEE

The Selection Committee is responsible for more than just identifying technically qualified contractors. Committee members must endeavor to select a contractor that also can function effectively as an integral part of the County service delivery team. The Selection Committee must always keep in mind that, from the day a contractor starts service delivery to the end of the contract term, citizens view that contractor as a part of the County in their area of operations. A service contractor's identity as a private sector organization becomes merged with the County's identity when providing a County service. The mowing contractor's employees in the field are perceived by citizens as public employees and not as members of a private corporation. The contracted engineer produces construction plans and specifications that have the same impact on the County infrastructure as those prepared by the County's engineering staff.

Because the quality of public service delivery is one way the effectiveness of the County is evaluated; the Committee also must decide which of the qualified contractors will enhance, not detract from, the citizens' and County Board's perception of how the County delivers its services and which will deliver the service at a fair and competitive price. Selecting the wrong contractor can be just as damaging to the image, effectiveness, and reputation of the County as providing inefficient and inexperienced in-house staff to deliver the service.

Selection Committee

A Selection Committee shall be used when evaluating consultant and professional service RFPs with a value expected to exceed \$25,000. When the RFP is expected to have a value under \$25,000, the use of a Committee shall be at the discretion of the user agency unless required by the Procurement Manager (with appeal to the County Administrator).

The Committee shall:

- / Prepare or assist in the preparation of the technical specifications and criteria for evaluation;
- / Review the original Request For Proposal (RFP);

- / Review the responses received and compare the content of each against only those criteria established in the solicitation;
- / Select the finalists that most nearly meet the award criteria;
- / Participate in the oral presentations by the finalists;
- / Investigate the performance of the offeror in contracts listed as references (or other contracts not listed as references but which may be known to County staff);
- / Conduct cost and price analyses of the data submitted by finalists;
- / Rank the finalists, from best to worst;
- / Participate as a member of or assist other members of the negotiation team in conducting negotiations with one or more of the top ranked finalists;
- / Evaluate the best and final offer(s) of the finalist(s);
- / Make a positive contribution to the Committee's mission of producing a professionally sound recommendation for award.
- / Give to the Procurement Manager all the Committee member's files, records, correspondence, completed evaluation forms, results of reference checks and site tours, and minutes of meetings, for inclusion in the master solicitation file in the event the Committee's decision is questioned or challenged;
- / Conduct the evaluation and selection process in strict accordance with the procurement rules of the County, ensuring that the final recommendation is without bias, and is legally defensible;
- / Provide information and assistance to the procurement and legal staff if protests are filed by unsuccessful offerors;
- / Maintain the confidentiality of the identities of the offerors and the security of the contents of the offerors' responses until the award is made; and

4 REVIEW THE RFP

A proposal cannot be evaluated effectively unless each Committee member is familiar with the original RFP. In addition to the task description for the project, the RFP includes the qualifications required of the offerors and identifies the criteria to be used in evaluating the offerors' responses. Committee members must be familiar with the requirements of the RFP to determine whether it mandates or only suggests that offerors provide certain services or information. The words "should" and "may" in the proposal simply encourage the offeror to do something. They are not to be considered mandatory requirements. Only "shall", "will" and other command words require action by the offeror.

The only award criteria that can be used in the evaluation process are those included in the original RFP. These criteria must be applied to the responses without change, deletion, or expansion. The use of any evaluation criteria other than those listed in the solicitation is prohibited. A protest from an offeror whose response was rejected as a result of the

Committee using criteria not identified in the published solicitation, has an excellent chance of overturning an award.

A commonly made error is to consider the offer of services proposed by an offeror, which were not requested, in the original RFP. You cannot use offers of "more" to rank one firm higher than the others in the initial scoring unless we have indicated as such in the proposal.

5 INDEPENDENT REVIEW BY COMMITTEE MEMBERS

The evaluation form is prepared by the Division Director, or designee, with the assistance of the Procurement Manager and distributed to all members, along with copies of the responses received. If time permits, each member should independently review and score the offerors' responses before meeting or discussing the responses with any other Committee members.

During the independent review, each Committee member should make notes of their observations directly on the evaluation form so that they may defend any challenge to their scoring during the full Committee review.

6 REVIEW BY FULL COMMITTEE

The full Committee meets and discusses the scores assigned by each member during the independent review. During the Committee discussion, each member usually acquires a better insight into the qualifications of each offeror from hearing the other Committee members' reasoning behind their scores. It is not unusual to have a dramatic change in a Committee member's independent scoring of an offeror because of this added insight. Because changes in score may result, it is wise to use two forms for review. If, because of the discussions, a Committee member feels that a score for one or more entries requires adjustment, the adjusted score is utilized as the final score on the second form. No changes are made to the independent score on the first form, while any unchanged scores are transferred to the second form.

The Procurement Manager retains the original copies of all members' evaluation forms. They will be kept in the RFP file with the Committee's final award recommendation.

7 IDENTIFICATION OF OFFERORS MEETING THE RFP REQUIREMENTS

The Committee identifies the offerors meeting the requirements of the RFP and those who do not qualify for further consideration. Offerors then are ranked by their individual total scores, the highest scoring offeror being first. The Committee then selects the top ranked finalists (usually from three to five) for further evaluation. There are no rules on how many may be interviewed. However, when more than four or five finalists are considered; the tasks of interviewing, reference checks, conducting oral presentations, and making the final selection become cumbersome. Offerors with the lowest scores are eliminated from further consideration at this stage. A listing of the offerors eliminated is made part of the record by the Procurement Manager.

8 ANALYSIS OF THE FINAL LIST OF OFFERORS IDENTIFIED

A second review is made of the finalists who are now ranked by point scores received (the highest point value being ranked first, etc.). If the list contains more than four or five firms, a second cut (one or more of the lowest scoring offerors) may be made. There are no restrictions on classifying all offerors as finalists.

Any time that the discussions of the Committee result in a change in the ranking of the finalists established by the evaluation forms, notes should be kept to justify the change.

When the finalists are selected, a memorandum setting forth a summary of the actions taken by the Committee is prepared. The Evaluation Forms, other pertinent documents and Committee members' voting records also are forwarded to the Procurement Manager at this time. The memorandum is reviewed by the Procurement Manager and filed as part of the official public records of the procurement. If the Procurement Manager concurs with the actions leading to the establishment of the finalist listing, written authorization will be given to proceed to the next step of the process.

9 ADDITIONAL INFORMATION (WRITTEN SUBMISSION) AND ORAL PRESENTATIONS

In some cases, when the first ranked finalist has a score much higher than the other finalists, oral presentations by other offerors may not appear to be necessary. However, the scores of finalists, although a good indicator of their capabilities, must never be considered as completely reliable or an absolute indicator of the finalists' ability to do the work. It is not unusual for offerors extremely skilled in preparing high scoring written responses to do poorly in oral presentations, have marginal references, or submit price responses that are far higher than available funds. It is always good practice, no matter what the scoring spread between the finalists, to interview at least the three top-ranked firms. Always keep the process competitive for as long as possible.

Oral presentations should not be scheduled in the order the finalists are ranked.

If the evaluation process has clearly shown that only one offeror is fully qualified and that none of the other offerors would qualify for an award, an oral presentation still should be held with that offeror. Contract negotiations with an offeror should not be conducted until the Committee has had an opportunity to hear the offeror's oral presentation, meet the project manager and other team members, and examine and discuss the offeror's cost proposal.

A second written submission (in addition to the original response) may be required of the finalists following the oral presentation. The written submission can include (by way of illustration only) responses to questions generated by the Committee during their initial evaluation meetings, the offeror's proposed cost of the work, an estimated budget, personnel staffing charts, schedules, and hours to be spent on the project by principals, (if not originally required in the RFP). The requested estimate of costs provides the Committee members with a better grasp of how the offerors view the total project from a financial standpoint.

10 CHECKING REFERENCES

The reference checks of the finalists selected for interview usually are a valuable part of the decision making process and are usually handled by the Procurement Manager, or designee. When possible, personal visits should be made to references rather than relying solely on telephone contacts. During the reference check, obtain information on how the contractor performed for the organization, the extent and type of claims filed, problems that occurred during the contract term and how they were resolved, and the contractor's reliability and level of professionalism. Immediately before each finalist's oral presentation, the Procurement Manager reports to the Committee on the results of the next finalist's reference check. The Committee members then may question the finalist during the interview on any unfavorable areas of the reference check. Never rely solely on a reference check; always request clarification from the

offeror about any unfavorable references obtained. The finalist must be given the opportunity to defend any adverse allegations made by former clients.

11 HEARING ORAL PRESENTATIONS

When an oral presentation is made, each Committee member takes notes on the content of the presentation to be able to effectively score the finalists after all presentations are made. A second evaluation form is generally used for this process. If an evaluation form is not used, complete records must be kept that are acceptable to Procurement and that indicate results of any Committee voting and any other information that supports the final award recommendation.

12 FINAL RANKING OF OFFERORS AND START OF NEGOTIATIONS

After each oral presentation, Committee members total the points on their evaluation form for that finalist. The totals of the Committee members' evaluation forms establish the ranking of the finalists. When the ranking is made and approvals obtained from Procurement, the first contract negotiation meeting will be scheduled.

The negotiation sessions may be conducted by the entire Committee, or a subcommittee of the Committee. The subcommittee approach is the preferred approach. With the approval of the Procurement Manager, persons who were not members of the Committee may be allowed to participate in negotiation sessions. The negotiators must be completely familiar with the project and the specialty area of the finalists. At the conclusion of negotiations, finalists are requested to provide a best and final offer, including cost, for the service required.

13 THE RECOMMENDATION FOR AWARD (EXPLANATION OF SELECTION)

The recommendation for award is submitted to the Procurement Manager in the form of a memorandum explaining the selection. The Procurement Manager will also prepare a separate evaluation form as well. These memorandum and evaluations, must include the following:

- / A brief summary of the service covered by the RFP;
- / Names of all offerors considered;
- / Summary of the criteria used for evaluation;
- / An explanation of the selection. Summarize the process and include as attachments all scoring and voting records, completed evaluation forms, and any other evaluation and scoring documents created during the selection process;
- / Names of finalists;
- / Summarize the process of selecting the recommended finalist. Include as attachments the scoring forms and other records of the selection process;
- / The identity of the recommended finalist and the reason(s) for selecting this finalist; and
- / Price, terms and scope of work of the contract to be awarded.

The final contract will be prepared by Procurement. However, the Committee must provide a detailed scope of work and details of costs to Procurement for inclusion in the contract.

14 PROTESTS

It is possible that protests may be filed against the County by an unsuccessful offeror. If this occurs, each Committee member may be required to explain and justify the points allotted for various categories on their evaluation forms. The official records must include evaluation forms that are filled out as conscientiously and objectively as possible.

15 COMMENTS ON THE FORM FOR EVALUATION OF RESPONSES

A General

The evaluation criteria in the sample form are general in nature and not intended to apply to all projects. The Committee shall revise the form (with the assistance of the Procurement Manager) to match each solicitation being evaluated by adding or deleting criteria as appropriate. The form must be approved by the Procurement Manager prior to release of the responses from the Procurement Office. The inclusion of criteria not described or referenced in the original solicitation is prohibited.

B Assigning Points

Points are assigned according to the degree of responsiveness of the information presented in the responses. The points indicate the *quality* of the response. Very low scores represent an unacceptable or poor response, low to middle scores represent satisfactory or average, middle and above scores represent a good or very good response. Excellent responses often are given all the points assigned for that category. The Committee can assign other numerical values to the range of points allowed for grading the quality of the response. It is important to note that the summation of the maximum points for all categories should total 100.

Only the best proposal for each category shall receive the maximum possible points for that category. The remaining responses receive fewer points for that category. Although the scoring of points is a matter of subjectivity, the Committee member's judgment must be based on the information presented in the offeror's proposal.

An offeror shall not be penalized due to lack of experience with the County or given a point advantage because of previous contract relationships with the County. The relevancy of such experience in terms of the RFP's scope of work may be judged as with any other reference of the offeror. When the County is used in this manner as a "reference", a reference check form must be completed and made part of the record. Point scores always shall be assigned in an impartial and objective manner.

C Weighing Scores

Some criteria in the evaluation form are given more importance (weight) than others by assigning a higher maximum score to that criterion. Weights indicate the *relative importance* of the responses, not their quality. Criterion that have maximum scores 5, 10, or 15 points higher than other criterion rank either "moderately important," "important," or "very important" as compare to other criterion. In general, once a score value has been assigned to an evaluation criterion, it cannot be interpolated or otherwise changed by the Committee members.

D Scoring Columns

During independent review (before the meeting of the full Committee), each Committee member reads the offeror's response and inserts a point score for each criterion. The

best response for each criterion listed receives the highest point value for that criterion. The responses for that criterion from the remaining offerors receive fewer points according to their relationship to the "best" response.

Negative or "0" point values can be assigned to evaluation criteria by the Committee member. When an offeror states that a given critical requirement will not be provided, a negative score (-) can be assigned to that criterion that is equal to the highest point value allowed for that item. If an offeror did not address an RFP requirement, a point value of "0" is entered in the form. Negative scores are assigned only when the offeror takes exception to a required item or clearly states that the requirement is not part of its offer.

Insert brief comments under each criterion, explaining the reason for any unusually low or high scores. These notes may be needed for reference during the full Committee discussions if the points assigned are questioned by another Committee member, or to justify the Committee member's score in the event of a protest by an unsuccessful offeror. When finished with the independent review, total the scores for each offeror.

When the full Committee meets to review the responses, new information received by a Committee member from the discussions of the full Committee may result in the Committee member deciding that a score requires changing. It is not unusual to have a Committee member's original score changed because of new information discovered at the full Committee meeting. For example, one member could have "discovered" information that other members thought was apparently missing from a response because the offeror put the information in an attachment instead of in the main section of the proposal. The Committee member then enters the revised score on the final form. If there are no changes to the independent review, the same point value is transferred to the final form. After Committee discussions are complete, the scores are totaled.

16 SECTION I - GENERAL EVALUATION CRITERIA

A Methodology, management approach, technique

How will the offeror approach the task? Is the approach well defined or vague? To what extent does the offeror propose a well organized effort?

B Time spent by principals

The reputation of a company often rests on the accomplishments of one or more of its principals. The involvement of a principal in smaller contracts generally is limited to approval of the proposal, possibly reviewing contract progress reports, and signing the final report. Does the response indicate that the principals of the firm will be heavily involved in the actual performance of the contract or only marginally involved in an administrative or overview capacity? What is the level of management's commitment of personal time to the delivery of the service covered by the RFP? (If the level of commitment and effort by the principals is minimal, the qualifications of the project manager become more critical to a successful contract than corporate reputation.)

C Qualifications and experience of principals and staff

Do the qualifications of the principals, project manager, and project staff indicate that the firm can complete the tasks in a professional and satisfactory manner? Are the persons profiled in the proposal the same persons who will be involved in performance of the project? Is the experience recent enough to address current changes in technology applicable to the service area?

D Understanding the project and the County's objectives

Does the offeror indicate an understanding of the County's view of the service to be delivered?

E Responsiveness to the RFP

This criterion deals with the quality of the response. Does the response address the content of the RFP or is it a "canned" response dealing primarily in generalities? Does the response specifically address what was requested, or is it a counter offer to what the RFP called for?

F Availability during project

Do not penalize an out-of-state offeror because of location if that deficiency can be overcome in other ways. If proximity to the work is important, and can be justified, the RFP should state that a management plan must be submitted with the proposal. The management plan indicates how the offeror would provide on-site assistance and describes the level of contact with the County during the project or during service delivery. Will a local firm act as part of a joint venture? Will there be resident local personnel? This criterion can be included in the evaluation form only if the original RFP specifically requested a management plan for non-local offerors.

G Experience and history of firm

This criterion examines corporate, not individual experience. Does the firm limit its work to specialized areas? Does the principal area of specialization match the area covered by the RFP, or is the specialized work to be done by others? Do the projects listed indicate that the firm can handle the project size and scope?

An offeror should not receive additional points because of past acceptable experience with the County. A restrictive requirement in the RFP for prior experience with the County may not meet the competition requirements of the Procurement regulations. Experience with the County is evaluated in the same manner as for any of the offeror's references, unless the conditions of performance in the County are so unique that they justify requiring this experience and the requirement was included in the RFP.

H Financial stability

If necessary, the County Director of Financial Services will provide, in the form of a score value, his or her evaluation of financial stability of each offeror based on the financial statements or other documents submitted. If the Director of Financial Services evaluates an offeror's financial stability as unacceptable, the response should not be considered further.

I Availability of personnel, facilities and equipment

Does the offeror indicate that adequate staff and resources are available for the project? Does the offeror indicate that the work will be done by its employees, or is much of the work to be done by subcontractors? Have these subcontractor's qualifications been submitted?

J Price

Price is typically given a value of 30, which represents a weight of 30% in relation to the total for all criteria. The costs submitted, if any, should be considered as estimates and the RFP should include a stage where costs can be negotiated with the highest ranked offeror. Cost is based on the offeror's perception of what the County is requesting. A poorly written RFP can result in an extremely wide cost spread between the low and high offerors.

Also, consider that price estimates at this stage can either be inflated by the offeror to cover all contingencies, or the cost purposely understated to assure favorable consideration and placement as a finalist.

A high price is often tendered because the offeror has interpreted the RFP to require more services than the County really needs or desires. It is not unusual to see estimated prices fall 20% to 50% during negotiations when both parties come to a full agreement as to exactly what is wanted.

Discussions on price belong in the negotiation sessions and should not be a major evaluation criterion at this stage of the process unless the cost is a major factor in an RFP that is highly detailed and exactly specifies all of the work to be done. Do not judge the quality of an offer by a low initial cost proposal or, conversely, eliminate an offeror solely because of a high initial cost proposal.

17 SECTION II - EVALUATION CRITERIA SPECIFIC TO THE RFP

While the above deals with general qualification criteria, more specific qualification criteria pertinent to the service may be desired. More specific criteria would include areas such as:

Special experience qualifications of personnel to be assigned to the contract.

Experience in dealing with governing bodies or in-house professionals.

Knowledge of state of the art techniques applicable to the service being purchased.

PLEASE SEE THE ATTACHED EVALUATION FORM AS AN EXAMPLE

18 REFERENCE CHECK QUESTIONNAIRE

The following format is suggested as an outline for the questions to be asked during a reference check of the finalists. Other questions pertinent to the RFP may be added as required upon approval by the Procurement Manager:

REFERENCE CHECK - RFP NO.

OFFEROR: _____

REFERENCE: _____

PERSON INTERVIEWED _____

- 1 DESCRIBE THE SCOPE OF WORK PERFORMED BY THIS FIRM FOR YOUR ORGANIZATION:
- 2 WAS PROJECT COMPLETED ON TIME?
- 3 WAS IT COMPLETED WITHIN BUDGET?
- 4 WHAT PROBLEMS, IF ANY, WERE ENCOUNTERED WITH THIS FIRM DURING PERFORMANCE, AND HOW WERE THEY RESOLVED?

5 HOW WOULD YOU RATE THE FIRM ON A SCALE OF 1-10 FOR:

PROFESSIONALISM? _____ FINAL PRODUCT? _____

6 WOULD YOU RE-HIRE THIS FIRM?

YES: _____ NO: _____ MAYBE: _____

7 HOW WOULD YOU DESCRIBE THE QUALIFICATIONS OF THE FIRM FOR A PROJECT INVOLVING:

HIGHLY QUALIFIED	_____
QUALIFIED	_____
ADEQUATE	_____
MARGINAL	_____

CALL MADE BY: _____ DATE: _____

19 COMMENTS ON THE FORM FOR REFERENCE CHECK OF OFFERORS

Reference checks are conducted either through a telephone call to the party named in the proposal or by a personal visit. The personal visit is the most effective approach. A reference often provides more information during a face-to-face discussion than during a telephone conversation with an unknown caller.

A Describe the work done

Determine the exact nature of the work performed for the reference. Was the contractor truthful when describing the scope of work performed for the reference?

B Was the project completed on time and within budget?

Did the contractor meet all the contract time and budget constraints?

C What problems were encountered and how were they resolved?

Ask about claims or contractual disputes during the contract term and other problems the reference had with the contractor, and how they were resolved.

D Professionalism, qualifications, etc.

When questioned, particularly over the telephone, most reference contacts hesitate to say the contractor performed terribly, that the contractor's employees were lazy or untrained, or that the work was unacceptable. These same people will more than likely agree to provide a numerical rating on professionalism, the final work product, reliability, etc.

E Would you contract with the firm again?

Ask for explanations of any "Maybe" or a "No" responses.

F Comments

Insert any other comments or observations made during the reference check.

20 FORM FOR EVALUATION OF ORAL PRESENTATION

EVALUATION OF FINALIST'S ORAL PRESENTATION

RFP# _____ **TITLE:** _____

FIRM NAME: _____

SUBJECTIVE SCORING

ENTRY SCORING METHOD

(C) COMFORTABLE WITH OFFEROR - INSERT A **PLUS 1** (1)

(N) NEUTRAL ABOUT OFFEROR - INSERT A **ZERO** (0)

(U) UNCOMFORTABLE WITH OFFEROR - INSERT A **MINUS 1** (-1)

SECTION SCORES: USING THE ASSIGNED POINTS FOR EACH OF THE FOUR SECTIONS, INSERT YOUR SCORES BY SECTION.

ITEM
SECTION
DESCRIPTION

SUBJECTIVE SCORE

(C) (N) (U) SCORES

I. PERSONNEL

- | | | | | |
|---|---|-------|-------|-------|
| 1 | Has key management been identified? | _____ | _____ | _____ |
| 2 | Have the key consultants and other team members been identified? | _____ | _____ | _____ |
| 3 | Has the presentation been clear as to the role and responsibilities of each of the above (1 & 2) will be? | _____ | _____ | _____ |
| 4 | Will the project manager and other presenter(s) be able to communicate with elected officials, staff, and the public? | _____ | _____ | _____ |
| 5 | Do you have confidence in the Project Manager? | _____ | _____ | _____ |
| 6 | Do you have confidence in the individual team members? | _____ | _____ | _____ |
| 7 | Do the individuals act as a team? | _____ | _____ | _____ |

TOTAL (SUBJECTIVE ENTRIES): _____

SECTION SCORE (MAXIMUM _____ POINTS) _____

II PAST WORK

1 What is your overall impression? _____

TOTAL (SUBJECTIVE ENTRIES): _____

SECTION SCORE (MAXIMUM ____ POINTS) _____

III TEAM ISSUES

1 Has the firm assigned roles and responsibilities to specific individuals? _____

2 Is the team leadership apparent? _____

TOTAL (SUBJECTIVE ENTRIES): _____

SECTION SCORE (MAXIMUM ____ POINTS) _____

IV APPROACH TO THE PROJECT

1 Does the team understand the unique qualities and nature of the project? _____

2 Has the team been specific in identifying the issues to be dealt with in this project? _____

TOTAL (SUBJECTIVE ENTRIES): _____

SECTION SCORE (MAXIMUM ____ POINTS) _____

V REFERENCES AND ADDITIONAL TECHNICAL RESPONSES

1 Technical responsiveness at Committee meeting _____

2 Results of reference checks _____

TOTAL (SUBJECTIVE ENTRIES): _____

SECTION SCORE (MAXIMUM ____ POINTS) _____

GRAND TOTAL (I - V): _____

COMMITTEE MEMBER CERTIFICATION:

I certify that I have independently reviewed, evaluated and rated the firm identified on this form and that the point awards above reflect my best judgment of the merits of the offeror.

Signature: _____

Date: _____

21 COMMENTS ON THE FORM FOR EVALUATION OF ORAL PRESENTATIONS

When the initial scoring of proposals is completed, all selected finalists are considered capable of performing the work. The purpose of the oral presentation is to obtain additional information about each finalist to enable Committee members to determine which of the selected finalists is (are) the best qualified.

The standard evaluation scoring form can be used in evaluating oral presentations. The Committee, together with the Procurement Manager, will make any adjustments to the form that may be necessary to make it conform to the specific RFP.

The scoring form is divided into four Sections: "Personnel" (the offeror's project team); "Past Work" (the offeror's experience with other clients); "Team Issues" (how the tasks will be managed by the team); and "Approach to the Project" (How well the team matches the project).

Maximum points allowed for each Section are determined by the Committee and the Procurement Manager and should be preprinted on the form for each Section in the space marked "SECTION SCORE (MAXIMUM ____ POINTS)." The maximum point values assigned may be weighted according to the importance of each Section. Section maximums could be 25, 50, 75, etc. as long as the total for all sections equals 100 points, depending on the importance of the Section.

When scoring, the three subjective entries, Comfortable (C or +1), Neutral (N or 0), and Uncomfortable (U or -1), are entered for each evaluation criterion to help determine the final points awarded to each finalist.

The relative frequency of particular entries in a Section should impact on the final score assigned to that Section. For example, if a Section contained all Comfortable (C) values, the finalist should receive a high score for the Section; if all the entries were Uncomfortable (U), a much lower score may be appropriate, and; if half of the impressions were Comfortable (C) and half Uncomfortable (U) or all Neutral (N), a score in the middle range of the maximum score would be appropriate.

At the conclusion of each presentation, each Committee member shall assign points to Sections I through IV of the evaluation form and compute the grand total score for that finalist. The grand total scores for each finalist are used to rank the finalists. In general, if the evaluation is for professional services firm, negotiations will start with the highest ranked finalist. If the evaluation is for services that are other than professional, negotiations start with the two highest ranked firms.